RESEARCH PLAN PROPOSAL

Evaluative Case Study on

TAM vis-a-vis A-MAP in Determining the Viewership of TV Channels

For registration to the degree of

Doctor of Philosophy

IN THE FACULTY OF ARTS & SOCIAL SCIENCES

THE IIS UNIVERSITY, JAIPUR

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IIS/2011/13036

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MAY, 2012

INTRODUCTION

Television industry witnessed healthy growth, driven by increasing advertising spends, rise in the number of television households, robust growth in DTH and expanding regional markets. Currently the industry is estimated at INR 306.5 billion as compared to INR 265.5 billion, registering a growth of 15.4%. The total number of television households in India increased from 124 million to 130 million, at a growth rate of five per cent. The penetration in India in terms of television households still remains low at 61% as compared to developed countries like the US and UK where the penetration is around 95% and 93% respectively. While India is the second largest cable and satellite (C&S) homes market in the world, surpassed only by China, the industry earns INR 192 billion in subscription revenue. This is much below the revenue earned in other geographies. This can be explained by the fact that ARPU in India is about INR 160 per month as compared to USD 45 to 60 in the US and UK, and USD 3 to 20 in comparable Asian markets. The government had mandated conditional access system (CAS) in Mumbai, Delhi and Kolkata and targeted to reach 55 cities and 20 million digital homes. However, only about 25% of the two million households in notified areas actually shifted to digital cable. The government decided to spend around INR 15 billion on Doordarshan and All India Radio to turn (AIR) digital. The infrastructure of Doordarshan and AIR in all major metros and important state capitals is expected to go digital. This will reduce the number of terrestrial transmitters by half (from 1400 to 700) and increase the channel carrying capacity of transmitters. While INR 6.2 billion has been budgeted for Doordarshan, the remaining INR 8 billion will be spent on digitising All India Radio (AIR). The Indian DTH market is rapidly becoming a key player in the distribution marketplace. It grew at 75% , a growth which is the highest in the world. With present prediction, it is likely to overtake the US in terms of the largest DTH market in the world. IPTV is facing the same issues. Though broadband connectivity has improved and the number of broadband users has also increased, the connection speed is still not up to the level desired for seamless viewing. Television advertising is one of the largest segments in the total advertising pie in India. With the economic turnaround, it bounced back to double-digit growth in line with the growth of the total advertisement market. Television advertisement consists of revenue from advertisers spending on terrestrial, satellite as well as mobile TV. Mobile TV advertising though is still nascent in India. The TV advertisement industry grew to INR 101.5 billion registering a growth of 14% over INR 89 billion. Television content is the smallest part of the industry accounting for 4.2% of the total industry revenues. (12)

The present study is an attempt to compare between TAM & A-MAP in determining the reach of TV channel. It would explore different various ways and techniques of these two organizations in determining the reach of TV channel in India. Ratings are the central means of mass audience measurement for the television industry. Ratings provide a quantitative measure of how many homes or people are viewing a program, advertisements, a station or the media itself. They are based on an audience snapshot using both geographical (multi-stage cluster) and characteristic (stratified) sampling techniques. Because of their feedback element, ratings largely control what is broadcast. The television industry uses audience ratings information to justify its broadcasting service performance as well as the cost of advertising spots and sponsorship deals.

TAM Media Research is a joint venture company between AC Nielsen and Kantar Media Research/IMRB. It is one of the two television Audience measurement analysis firms of India (the other being aMap). Besides measuring television viewership, TAM also monitors advertising expenditure through its division AdEx India. The viewership cell runs what is one of the largest Peoplemeter TV Panels in the World with approximately 30,000 sample individuals representing all the Class-I towns (towns with population more than 100,000) polled every week for their Viewership habits. This division measures television Viewership of audiences for the 300-plus TV stations operating in India.

On the other hand, Audience Measurement & Analytics Limited (aMap) is the only overnight TV Audience Measurement System that provides data on Television in India on multiple dimensions like demographics, ownership, viewership etc. It also run the AmapDigital, an overnight DTH (Direct-to-home) TV audience measurement panel.AMap collects viewership data using Telecontrol VIII data collection units sourced from Telecontrol AG, and wireless connections using GSM modems.The measurement system of aMap is rigorous and comprehensive enough to handle a complex multi-layered Indian audience. Also, because of competition among so many channels, the need was to get data much faster.

REVIEW OF LITERATURE:

Menon Arpita (2010) Media Planning and Buying

This book includes the sheer cultural diversity of Indian population, changing customer choices influenced by evolving media technology, fragmented markets, rising media costs, and increasing demands of accountability from the clients, media business has grown in both complexity and importance. In such a rapidly changing media landscape, with the increased availability of research and data, media agencies and marketers (brand and sales) have to thoroughly understand media functions. This book lays down the theoretical foundation of the principles of media planning and buying in the Indian context but on the contrary Menon does not give any information regarding A-MAP which is integral tool for advertisers in determining the ratings of the channels. Still the theoretical points are illustrated by case studies. Case Exercises which could be used by students for group assignments and class discussion purpose have also been included. (1)

Huge Makolm Beville, Jr (1988) Audiance Rating: Radio, Television, and Cable

This book defines the rating system and its influence over programming and advertising. This book deals with all the three aspects that are radio, TV and cable .In this book nothing has been mention about TAM and A-MAP but the old techniques of rating system are valuable for any research study. This book also deals with some topic of research. (2)

Michael F. Starr (1932) Electronic media management

The book features important updates that reflect the enormous changes that have taken place in recent years. This book includes discussions on Internet and convergence, as well as reflects the latest information on broadcast and cable regulations and policies. It also includes a fresh batch of case studies, and study

questions. As in previous editions, this book also covers management theory, audience analysis, broadcast promotion, and marketing. Michael F.Starr gives information about audience selection and audience analysis but it does not include the rating system in detail. (3)

Dennis F. Herrick (2003) Media management in the age of giants : business dynamics of journalism

This book is a new age of media giants, with an obsession for the bottom line to satisfy shareholders dominated by institutional investors, has made awareness of business and financial issues more critical than ever for both new and continuing employees of such enterprises. Media Management in the Age of Giants: Business Dynamics of Journalism is a fresh, insightful, practical media management textbook that examines the current media industry in an age when all the rules seem to be changing because of the new phenomena of digital technology, publicly-traded media conglomerates, and changing media habits and values among consumers. Readers are introduced to basic business concepts, terminology, history, and management theories, all in a context of contemporary events involving media companies in the act of doing business. (4)

Bernadette Marie Casey, Bernadette Casey (2002) Television studies: the key concepts

In this book Bernadette traces out the theoretical perspectives which have shaped the study of television - Marxism; semiology; feminism concepts which have shaped the study of television - narrative; representation; bias television genres - soap opera; news; science fiction methods used for understanding television - content analysis; audience research relevant social, economic and political phenomena - ownership; social policy. (5)

Emma Bernay (2008) Television

This book contains variety of opinions on television, its beneficial and harmful effects of television, censorship of television content, and consumer choice of cable channel selection. This book widely gives a platform to discuss the good and bad effects of viewership patters among the masses. (6)

Peter B. Orlik (1988) Critiquing radio and television content

The book focuses on TV and radio companies, explains their real-life examples and interviews of media managers illustrating how management is being conducted in all kinds of media companies. On one hand it does include chapter-ending case studies and website listings, balance sheets and income statement examples, information on labour unions and over all a thought-provoking chapter on entrepreneurship, and a detailed index but at the same time this book does not give any reference regarding rating system and audience measurement.(7)

John C. Condry (1989) The psychology of television

This volume addresses the content of television -- both programs and advertisements -- and the psychological effects of the content on the audience. The author not only reports new research, but explains its practical applications without jargon. Issues are discussed and described in terms of psychological mechanisms and causal routes of influence. While primarily referring to the American television industry and American governmental regulations, the psychological principles discussed are applicable to television viewers worldwide. (9)

Milavsky Ronald (2006)

In this article, Milavsky puts a question whether these bounces in rating are artificial or real, but there is ample reason to suspect the system is faulty thanks to the publication of a remarkable study of national ratings methodology conducted by statistical research, inc, sponcered by CONTAM .He further adds

that some relevant information was not provided either because it was not available or because Nielsen did not choose to share it. He concluded by saying many methodological details were provided that have never before been made public. But in this article he did talks about A-MAP which is one of the main element of my study. (15)

Dr.N.Baskara Rao(2001)

He openly says that TRP ratings are only projection and for only a select few cities and based on a small sample of representing TV household was not convincingly explained .The pattern of selecting TV channel, viewing programme, timings etc are measured with the help of a public meter installed in the selected few households. He further opines that the general impression often given is that these ratings are national and represent total TV owning households in the country is not fully correct. In this study he did not talked about the new technique of rating system i.e. A-MAP. (16)

John D.Leckenby,(1996)

This paper considers the issue of audience measurement on the World Wide Web portion of the Internet. This problem is approached by first considering the definition and measurement of audience in traditional media such as magazines and television. The similarities and differences of the Internet with traditional media are examined. Current Internet audience definitions and measurement systems in place through commercial services are examined. Suggestions for development of standardized definitions and measures are provided. Examples of the application of currently available Internet audience data, through use of relationships of total hits to unique users, to estimate reach/frequency alone and in combination with traditional media type vehicles are provided.This paper lacks the content about the new rating systems available in India. (17)

Arora Rajeev (2004)

A TV viewing measurement system is threatening to end the dominance of AC Nielsen's TAM Media Research. It will provide broadcasters and media planners with a new approach to measure exposure of over 200 channels across India's 48 million cable homes. And at stake is Rs 5,500 crore worth of ads, determined by 150 media planners. This new chip technology will help in mapping the day's TV ratings overnight as against TAM, which takes a week. Depending on the success of this venture, new firm Audience Measurement and Analytics Ltd (AMA) hopes to cash in on this technology to measure cinema, Internet, newspaper and radio exposure.This study only talks about the advantages of A-MAP and did not considered the advantages of TAM. (18)

Audience measurement and analytical ltd (2010)

MEASURING TV viewership is set to change with the entry of India's first online audience rating service – A-Map (audience Map) - from Ahmedabad-based Audience Measurement and Analytics will change TV viewership pattern in India.This study has given a detailed knowledge about A-MAP but did not talked about TAM at all which is a main element of my study. (19)

Ambarish Dasgupta (2011)

He said that advertising revenue growth propels the television industry because DTH leads growth in distribution segment, Regional channels are increasing their share in TV advertising. Broadcasters are rebranding themselves to establish greater connect with younger audiences and Regional players are increasingly focusing on the kids channel market. (20)

L.V.Krishnan (2010)

This paper records a continuation in a series of studies launched to appreciate TAM ratings in a holistic manner. Pure quantitative or qualitative studies often stop short of giving the user a complete understanding of viewing behaviour, especially when it comes to complex behaviour such as channel surfing. This paper uses a unique approach to tackle this problem. It does this by requesting ex panellists to be part of an observation and depth-interview study. The panellists, of course, were at some time yielding minute-minute TAM data, so information gained at this stage yields rich explanatory insights to the behaviour when they were on the panel. (21)

Sharan Sharma (2009)

This paper looks at what propels a home to finally shift or even to sample a new disruptive programme. The recent launch of Indian Idol (the Indian version of American Idol) is used as a test case. Understanding a complex behaviour like viewing requires much more than pure quantitative or qualitative techniques. At TAM India, we have been conducting a variety of experiments to uncover insight into viewership behaviour. One of these experiments has yielded very encouraging results and the attempt of this paper is to describe the process and the results thereof. For the first time, a new observation-cum-game play approach using ex-TAM panellists has been used. This means that a common sample now yielded both viewership minute-to-minute data and qualitative insights. This is what allows a broadcaster to study the 'why' behind past viewing patterns and use the leanings for his future activities. This study does not provide information about the advantages and disadvantages of A-MAP. (22)

Buck Stephen (1987)

He said that it is noted that changes in TV characteristics in the UK and Europe, including multi-set households and VCR use, created a demand for electronic

viewing measurements. And there should be a device that can measure the reach of TV channel. (23)

OBJECTIVES :

1) To identify the research parameters of TAM and A-MAP

2) To understand appropriateness, reliability, validity and accuracy of TAM and A-Map

3) To explain and understand strong and weak points of TAM and A-map and to suggest improvements in their methodology.

4) Exploring decision making criteria for those who are not using or subscribing Tam and A-MAP.

HYPOTHESIS :

1. TAM and A-map are both incomplete instruments to render adequate, reliable and valid information to decision makers

- TAM and A-MAP are incomplete due to inadequate sample size

- TAM and A-MAP suffer from serious security flaw: such as secrecy and data manipulation

- TAM and A-MAP are not able to cover all TV channels in India

2. A-map is stronger regarding recency of data as compared to TAM

3. A-map is less prevalent among decision makers, due to its recency in the market

4. Popular articles in magazines advised from industry friends and opinion leaders ,number of advertisement and competition ads placement

PLAN OF WORK AND METHODOLOGY :

(A) Research Design - Exploratory and Qualitative.

This study is a comparison between two organizations determining the reach of television in India. The design used here is qualitative and exploratory as to gather preliminary information that will help define the problem.

(B) Data Source –Primary and Secondary

The primary data collection comprises of direct interviews with advertising decision makers and people working in various channels. The secondary data will include library, internet, etc.

(C) Research Approach –

The present study intakes survey research approach where in the information will be collected from advertising decision makers and people working in various channels to justify the problem. The research tools used in this study is schedule and in-depth interviews both structured and unstructured and the contact method will be personal, mail and telephone.

(D) Sampling

The study takes non random judgemental sampling as the number of respondents is set. The questionnaire and schedule will reach to the people working in the top 5 networks of India and their channels and top 5 advertising agencies of India.

Sample Unit

Top 5 Advertising agencies of India

- Group M
- Lintas

- Draft-FCB-Ulka
- Starcom and Zenith optimedia
- OMD

Top 5 Networks of India

- Star
- TV Today
- Sony Entertainment
- Network 18
- Zee

Sample Size

The sample size taken for the study is 30. 3 persons from each 5 advertising agencies and 3 persons from each 5 networks will be taken as sample.

DATA ANALYSIS TOOLS:

After collecting the data a descriptive analysis will be done which will be followed by the appropriate statistical analysis.

Statistical analysis will include tabulation of data and representation of data using graphs and charts for diagrammatic representation of data.

LIMITATIONS OF THE STUDY :

1) Limitation of time, space and manpower are the most restrictive aspects in an empirical study and this study may also be limited due to these aspects.
2) The answers of the respondents, as such will have to be taken as true.
3) The respondents may be quite on certain issues and as such certain inferences will have to be drawn on the basis of observation of the overt

behaviour of the respondents which may include gestures and facial expressions

4) The conclusions drawn may not be universal.

JUSTIFICATION OF CASE METHOD

1) The primary advantage of a case study is that it provides much more detailed information than what is available through other methods, such as surveys.

2) Case studies also allow one to present data collected from multiple methods (i.e., surveys, interviews, document review, and observation) to provide the complete story.

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